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## Senegal

### Exporter Guide

### Annual Update

### 2008

**Approved by:**

Robert Hanson, Agricultural Attaché  
U.S. Embassy Dakar

**Prepared by:**

Mbalo Ndiaye, Agricultural Specialist

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**Report Highlights:**

Senegal's efforts to emerge as an alternative trade hub in West Africa remain constrained by high energy prices, deficient infrastructure and a poor investment climate. Nonetheless, residents of Dakar, including a large expatriate population, have a relatively high disposable income which translates into a vibrant retail market for food products and other consumer goods. Senegal's geographic position vis-à-vis the U.S. east and gulf coasts, its modern communication infrastructure, and its favorable trade policy offers trade opportunities for U.S. exporters, especially for intermediate and consumer-ready products. Intermediate soybean products such as crude soybean oil, soybean meal and soy flour are increasingly gaining interest among importers.

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Annual Report  
Dakar [SG1]  
[SG]

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**SECTION I: MARKET OVERVIEW**

Senegal is primarily an agricultural country with a growing industrial sector in cities, especially Dakar, the capital. The main food crops are millet, corn, sorghum, rice, and vegetables. Peanuts are the primary cash crop and the country's main agricultural export. Cotton is also grown and there is a sizable coastal fishing industry. Large numbers of cattle, poultry, pigs, sheep, and goats are raised, although intermittent drought conditions can reduce their population. The country earns foreign exchange from fish, phosphates, peanuts, tourism, and services. Senegal has a small export-oriented horticultural industry. Its economy is highly vulnerable to variations in rainfall. As the country depends on imports for approximately 70 percent of its food needs, Senegal also remains vulnerable to changes in world commodity prices.

Although its economy is half the size of that of Côte d'Ivoire, Senegal is economically much stronger than its immediate neighbors. Senegal's economy has been growing steadily at rates close to 5 percent since the mid-1990s. The steady growth gained in 2004/2005 dropped to 3-4% in 2006 and 2007 as the result of two consecutive poor agricultural harvests (2006, 2007), the tremendous slow down in the industry sector and the continuing crisis in the energy sector. A large Senegalese expatriate community also returns important amounts of foreign exchange to Senegal in the form of remittances, estimated at USD 643 million in 2006. Senegal benefits from the African Growth and Opportunity Act (AGOA) preferences, and is developing a Millennium Challenge Account (MCA) compact which would contribute in improving roads and irrigation infrastructure.

With its well-developed (although aging) physical and social infrastructure and relatively well-diversified industrial base, it is the economic hub of the region and the most visited country in West Africa. Senegal has well-developed though costly port facilities, an international airport serving 28 international airlines (including U.S. airliners and other U.S. serving foreign airliners) that serves as a regional hub. The Dakar International airport is ranked first in the ECOWAS zone in terms of its flow of passengers. The airport and the port of Dakar enjoy a favorable geographical location, because it is located at the foremost end of the West African coast and is a crossroads for several maritime roads between Europe, North America, Latin America and the African continent. The port is over 3,260,000 square meters large and hosts mainly container-carriers, cargo vessels, roll-on roll-off vessels, tankers, and fishing boats. The port also includes infrastructure for transit to inland countries such as Mali and Burkina Faso. The port is also connected to the national and international railway network. Senegal has also one of the most reliable telecommunications infrastructures in West Africa.

Senegal's commercial policies are primarily oriented towards regional integration as the country is an active member of WAEMU (West African Economic and Monetary Union), along with other 8 countries: Benin, Burkina Faso, Cote d'Ivoire, Guinea-Bissau, Mali, Togo, and Niger. WAEMU is a union based on free markets and reliance on a common commercial policy (harmonized customs), and is becoming a dynamic regional financial market. Senegal is also member of the Economic Community of West African States (ECOWAS), which is a market of 200 million consumers from 15 countries.

Imports of agricultural commodities and packaged foods offer increasing potential as Senegal remains a food deficit country for cereal staples such as wheat and rice. It is the second largest African importer of rice after Nigeria. Rice imports were 1,087,452 tons in 2007. A great portion of imported rice is re-shipped to neighboring countries, which makes Senegal a growing trade hub for the rest of West Africa. Population growth, urbanization and evolving diets have led to impressive growth in wheat imports in Senegal and throughout West Africa.

Wheat flour consumption increases by at least the population growth of 2.75 percent. Senegal imported approximately 387,000 MT of wheat and wheat flour in 2007.

The import market for food and agricultural products is dominated by European, Asian, South American and African suppliers. France dominates the market for wheat and high value processed products. Thailand is the leading rice exporter, while Brazil, Argentina and Uruguay are increasingly gaining a large share of the rice and vegetable oil markets over the last four years. Market potential exists, however, for new entrants in the market for bulk, intermediate and consumer products. For example, a wide assortment of Turkish snack and consumer goods has recently penetrated the market. Senegal applies a ban on the imports of frozen poultry from all origins since October 2005.

Total U.S. exports to Senegal decreased from \$135.3 million in 2005 to \$ 105.3 million in 2006, and 99.6 million in 2007. Meanwhile, U.S. exports of food and agricultural products have grown from nearly \$10 million in 2006 to \$25 million in 2007. U.S. exports of food and agricultural products have reached nearly \$35 million in the first 10 months of 2008. While these figures include a modest amount of food aid, there are also growing commercial sales of wheat, rice, milk powder, tree nuts and planting seeds. Although Senegal's domestic market is relatively small by U.S. standards, its increasing openness to foreign trade and investment, its geographic location and market forces are significant opportunities for exports. Because of the political instability in Cote d'Ivoire, Senegal is increasingly an alternative gateway for companies interested in doing business with other countries in the region. An American Chamber of Commerce has been opened in Dakar in 2005 to assist U.S. and local companies increase investments and trade between the two countries. The U.S. Foreign Agricultural Service and the Foreign Commercial Service have offices in Dakar, Senegal with regional coverage.

The population of higher-income consumers has increased significantly over the last five years as the result of the relocation of an increasing number of expatriates from Cote d'Ivoire. This has contributed in increasing the demand for high value products (HVP). The relatively high population growth (2.7%) and urbanization (3%) indicate that this trend will continue. However the soaring food prices over the last two years have tempered this trend for increasing consumption of HVP products. Casino, a major French grocery retailer has recently invested heavily in Senegal, bringing with it a much expanded product range which includes U.S. origin products, such as almonds.

The population of Senegal is estimated at 12.8 million people, with 41% living in urban areas (Dakar, the capital city hosting 25% of the total population). The other highly populated area is the peanuts belt (centre of the country), which accounts for more than 35% of the population. The population is quite young; 55% are less than 55 year old. Rural farmers involved in rain-fed agriculture account for 70% of the workforce. Foreigners represent about 2% of the population. They are mainly based in Dakar, where they are involved in business activities, and also in the industrial and services sector, as well as in international organizations.

The table below shows some U.S. comparative advantages and challenges and puts the opportunities in perspective:

Advantages	Challenges
Senegal's status as a major commercial hub in West Africa; sophistication of higher-income consumers.	Lack of U.S. interest due to the relatively small market size. French and Asian domination of the market as well as some competition from cheaper and lower quality food products from Asia and Turkey.
Senegal has one of the regions more active maritime ports; Regular airliners from East Coast airports, including U.S. airliners.	Higher freight rates and longer transit times from the U.S. than from EU, Asia or South Africa.
Senegal's Population of 12.8 million is growing at an annual rate of 2.7 percent per annum.  GDP growth of 5.7% in 2005; Tertiary sectors (including trade) representing 60% of the GDP.	The average per capita income is estimated at \$710.
	Cases of poor governance and administrative hurdles have reduced foreign and domestic investment in the economy.
Opportunities exist for U.S. products targeting niche markets and there is a growing interest of U.S. commodity associations (U.S. Wheat, U.S. Rice Federation, WISHH and U.S. Soy Export Council etc.) in Senegal and extensively West Africa	U.S. exporters have incomplete knowledge about the Senegalese market
Common external tariffs for imports and elimination of tariffs among the 8 countries of the WAEMU (the francophone West African Economic and Monetary Union).	High business costs relative to neighboring African countries such as port processing and Customs duties. WAEMU recommended value added tax (VAT) may apply on some imported agricultural and food commodities at the port of entry as a duty.
The Senegalese consumer perceives U.S. products as being of high quality standards, thus accepts U.S. food products.  Export financing opportunities exist through EXIM Bank	U.S. products are not always price-competitive due to the freight costs for products shipped from the U.S.  Financing packages such as supplier credit, made available by European competitors have disadvantaged U.S. companies

## SECTION II: EXPORTER BUSINESS TIPS

The following is a list of directions and tips on exporting food and agricultural commodities to Senegal. They are grouped into two main subjects; *'Marketing and Communication'* and *'Exporting'*.

### Marketing and Communication

- Senegal operates at GMT. Dates are written in day/month/year format. For instance 4/11/2007 means November 4, 2007. Make sure your correspondence and contacts with your local partners and facilitators take these differences into consideration.
- The official language is French, which is used everywhere in the administration and is spoken by most literate/educated Senegalese. Wolof is the most widely spread among the six national languages (it is spoken by 80% of the Senegalese); the other national languages are Diola, Serere, Pulaar, Soninke and Mandingo. Try to learn a few words of Wolof, at least social greetings. Senegalese usually socialize first before getting down to real business.
- Be patient and be prepared to be invited for non-business related meetings such as dinner or lunch. When invited for lunch or diner at home, do not bring any food with you, but do not hesitate to say politely what you do not eat a certain types of food.
- As a westerner, Senegalese who are not yet acquainted with you will call you by using Mr. or Mrs. followed by your family name.
- Although you may start with direct informal contacts with your local partner, Senegal's administrative system is very much influenced by the French system and requires that you write formally to your contacts to introduce yourself and your export project.
- Foreign businesses are highly recommended to hire a representative or agent (s) with strong connections and who has an extensive knowledge of the local economy and the government regulations and institutions involved in trade as several government bodies still regulate and are assigned to approve commercial initiatives. Good connections with government officials can speed up administrative procedures related to your business. However, set a mechanism to monitor closely your agent against agreed performance.
- There are several companies and private consultant firms providing information and guidance to exporters to Senegal and other WAEMU countries. To find out about the various assistance services available, visit: <http://www.gouv.sn/investir/structures.html>, <http://www.investinsenegal.com>, and the website of Trade Point Senegal (<http://www.tpsnet.org>). You are also strongly advised to consult with the Office of Agricultural affairs (FAS/USDA) at the U.S. Embassy Dakar (see contacts under Section V).

### Exporting

- Conduct market research, especially for product testing, price comparisons, identifying your competitors, and reviewing export statistics of the 5 previous years to determine the size of the market. Be patient and take the necessary time to understand the dynamics of the market and consumers' preferences.
- Be cognizant also of the fact that good market data may not exist. The supply of imported goods is erratic and there may very well be pent-up demand for your product. The best approach is to contact the importers – they will know the customers tastes and needs as well as feasible quantities.
- Senegal organizes an international trade fair every two years in Dakar. Plan to participate to at least one event to advertise your products and/or make business contacts including with companies located in other West African countries.

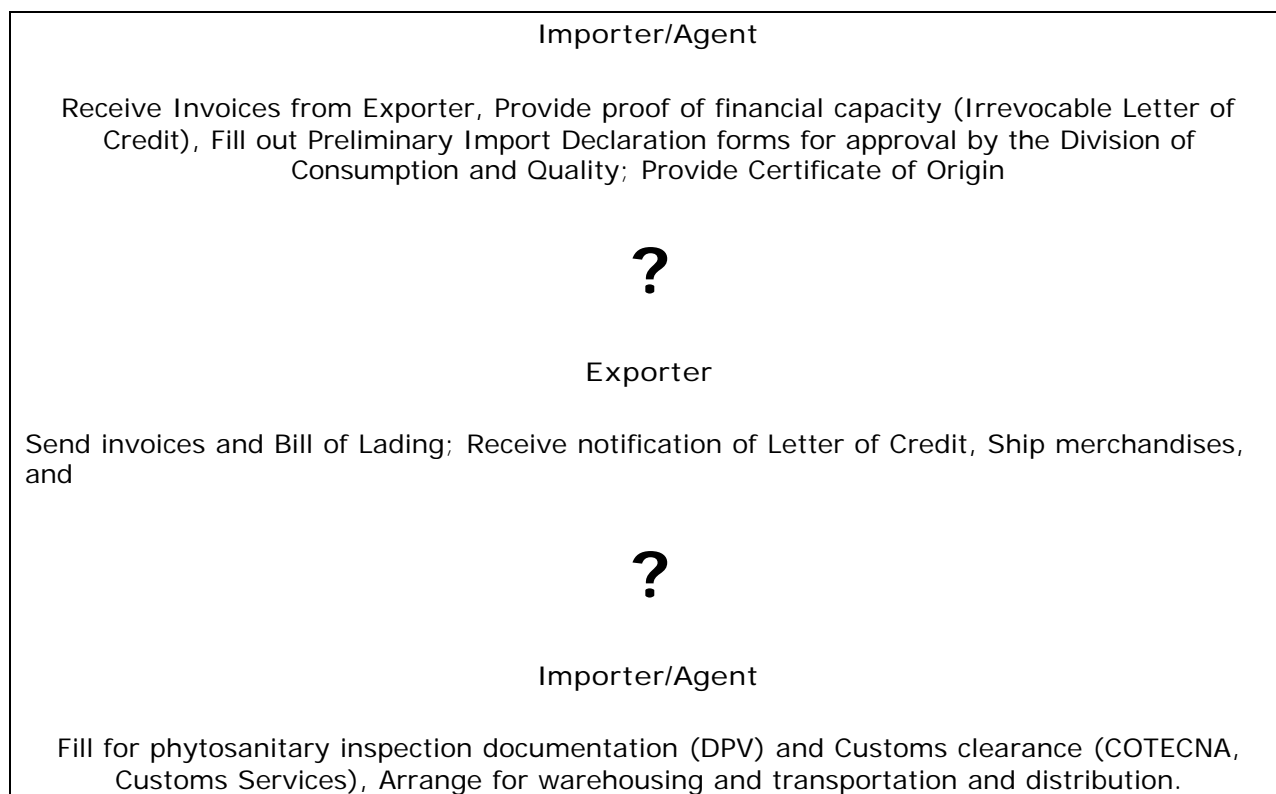
- Make sure your local partner (importer or agent) has the capacity to process the administrative requirements for the entrance of your products in Senegal. Several services are involved in the processing of import authorizations.
- Commercial food commodities that enter the port of Dakar are submitted to phytosanitary inspections by the Directorate of Plant Protection (DPV) and the Ministry of Commerce. These tests are conducted on samples selected from the shipment, but they do not preclude your agent from pursuing the registration approval process. Prior to shipping your products make sure your agent or importer has received the bill of lading and the phytosanitary clearance documents.
- Exporting documents required in Senegal include the following:
  1. Two copies of the commercial invoices, which indicate the identity and contacts of exporter and the importer; a complete description of the merchandise, its weight and quantity, and CIF value; and a complete description of the merchandise. The invoice should be done in French or issued with a certified French translation.
  2. A Pro Forma Invoice containing the aforementioned information
  3. A Certificate of Origin provided by the importer, specifying the quantity, quality and prices of the products subject to customs duties. COTECNA, a Swiss private company, is assigned to determine the value of the shipment, on the basis of which customs fees are determined. U.S. exporters are urged to contact COTECNA's U.S. office at [www.cotecna.com](http://www.cotecna.com) for further information.<sup>1</sup>
- Import procedures include the following:
  1. Importers must deposit a Preliminary Import Declaration seven days before shipping imported goods having a value equal to or greater than \$2,000.
  2. Automatic approval of the Preliminary Import Declaration is obtained from The Division of Consumption and Quality of the Ministry of Commerce by submitting three copies of the Pro Forma Bills of Lading with the declaration. The Preliminary Import Declaration is valid for six months and can be extended for three months. This must be canceled and reissued if there is a change in supplier, an increase in the value of the order of more than ten percent, or a modification in the quantity of the order.
  3. Any FOB import value equal to or greater in value than CFA three million (\$6,000) must be inspected by a U.S. pre-shipment inspection company before the shipment. This company must present a clear report of findings; and issue a Pre-Shipment Inspection Certificate (PSI). Note that PSI is not required for the following products:
    - Live animals
    - Perishable goods for human consumption neither frozen, nor deep frozen (meat, fish, vegetables and fruit)
    - Plants and flowers

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<sup>1</sup> On 27 February 2008, Cotecna Inspection S.A signed a new exclusive inspection contract with the Government of Senegal. Within this new contract that started on 1st March 2008, Cotecna will provide Pre-Shipment Inspection and Destination Inspection including Scanners and Risk Management\* as well as Transit Monitoring\*\* services.

- Cereals (HS chapter 10) imported by the public sector or approved by the public sector
- Imports with a total order FOB value equal to or below CFA 3 million

The following chart describes the documentation flow for imports:



- Make sure your product is packed and shipped for a tropical climate and provide clear storage instructions (preferably in French). This is particularly important as few cold storage or air-conditioned facilities and delivery trucks exist.
- Consider investing in promotion and advertisement, especially when introducing a new product or brand. Most local distributors of imported products will expect their suppliers to provide or participate in advertising and promotional support. Sales promotion material and technical documentation should be also in French.
- Payment may be made by cash, check, wire transfer or any other legal and accepted methods. The majority of suppliers demand a 50% down payment at the time of order and the remaining half after delivery. Some require advance payment. Be aware of government and parastatal clients whose payment may be delayed. Normally, payments are made within 30 to 60 days. Any payment for imported goods greater in value than CFA one million (\$2,000) must be made through an approved Senegalese bank or financial institution.
- There are several private customs and transit consultant firms that can assist your agent or importer speed up these procedures and thereby reduce cost related to administrative authorizations.
- Study the most recent GAIN reports for Senegal and West Africa produced by the Foreign Agricultural Service. These reports are available in the internet at <http://www.fas.usda.gov>. You may also need to visit the U.S. Embassy Dakar website to read the Country Commercial Guide for Senegal for further trade and guidance.



- Contact the Foreign Agricultural Service in the U.S. Embassy, Dakar ([Agdakar@fas.usda.gov](mailto:Agdakar@fas.usda.gov)) for any issues such as standards, tariffs, regulations, labeling, potential buyers and other concerns.

### SECTION III: MARKET SECTOR STRUCTURE AND TRENDS

- Distribution Channels

The distribution network in Senegal can be subdivided into the following categories: Importers-wholesalers; semi-wholesalers; and retailers. Most importers have storage facilities and so are wholesalers. Their clients are semi-wholesalers, who sell to retailers and directly to customers,

Senegal's food market is made up of various levels of distribution channels. A modern distribution sector including supermarkets and modern convenience stores is dominated by a few French and Lebanese owners although some Senegalese investors have entered this market niche in recent years. The main modern supermarkets are Casino, Pridoux, and Filfilli. These companies import and retail their products with limited intervention of other actors. They are mostly supplied directly by European, American and Asian suppliers. Most of these stores are located in Dakar (the main trade hub of the country with nearly 5 million people) and their main customers are upper and middle class workers and the expatriate community. The modern distribution sector includes also very competitive traders in the wholesale and retail distribution channels of various consumer foodstuffs. These include gas station convenience stores.

The retail food sector is essentially made up of independent shops called "boutique" selling primarily food products. They account for the largest portion of the food distribution sector since they cater to the largest population, especially those with lower purchasing power. These are small convenience stores located in residential areas; close to the consumers and selling very diverse food items. Their share in the food market is very difficult to quantify because most of them are informal. The informal food distribution sector also includes small retailers of fruit, vegetables, fish, meat, and beverages located in street or municipal markets.

Senegal hosts nearly 500 registered hotels and resort. Some of them are of European or American standards, and thousands of restaurants, bars and catering services. Most of these HVP consumers and food service providers are located in Dakar, Mbour, Saint Louis and Ziguinchor, the most important tourism cities. In average, Senegal hosts 530,000 tourists each year including 50% from France, and nearly 2.3% from the United States<sup>2</sup>. The number of fast food restaurants, modern bakeries and ethnic foreign restaurants (Indian, Vietnamese, Italian, etc.) has also increased noticeably in recent years. Although, these are relatively small consumers of HVP products, the increasing urban and middle class population, the increasing number of expatriates due to instability in neighboring countries (especially Cote d'Ivoire and Guinea), and the growing tourism industry, offer sales opportunities for U.S. HVP food and food services.

The domestic food processing industry is dominated by the wheat, sugar, fish and tomato paste industries. Most HVP food and beverages are imported from Europe and Asia. U.S. brands are increasingly entering the market since 2000 with the freeing of the import markets. Senegal processing capacity of HVP is very limited due to under-developed industrial infrastructure. Most locally produced HVP products are of lower quality (particularly cereals and beverages) and do not meet HVP consumer's needs.

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<sup>2</sup> [www.ausenegal.com](http://www.ausenegal.com)

**SECTION IV: BEST CONSUMER ORIENTED PRODUCT PROSPECTS*****Best Agricultural Product Prospects<sup>3</sup>:***

1. Rice
2. Wheat
3. Corn
4. Vegetable oil
5. Soybeans/soybean meal
6. Feed and fodders<sup>4</sup>
7. Planting seeds (peanuts, fodder plants)

***Best HVP product prospects:***

8. Milk (Liquid milk, Skimmed and whole powdered milk)<sup>5</sup>
9. Canned fruits and vegetables<sup>6</sup>
10. Tomato puree/ketchup
11. Bottled vegetable Cooking oil
12. Fruit preparations and juices
13. Spices and sauces including soy sauce
14. Mixed seasoning
15. Condiments
16. Breakfast cereals
17. Margarine/butter
18. Pasta products
19. Snack foods (biscuits, cakes etc)<sup>7</sup>
20. Confectionery products (candies, gums etc)
21. Ice cream
22. Spirits, liqueurs
23. Beers and Wines
24. Non alcoholic beverages (Tea, coffee, fruit drink)
25. Bakery and other food Ingredients (Yeast & Baking powder)
26. Mayonnaise and Salad Dressing
27. Baby Foods
28. Canned soups/powdered soups
29. Health food products

**SECTION V: POST CONTACTS AND FURTHER INFORMATION**

Robert Hanson  
 Agricultural Attaché  
 Foreign Agricultural Service  
 U.S. Embassy Dakar,  
 Ave. Jean XXIII B.P 49 Dakar, Senegal  
 Tel: (+221) 33-869 6100 ext. 3211  
 Fax: (+221) 33-820 5673  
 Email: [robert.hanson@fas.usda.gov](mailto:robert.hanson@fas.usda.gov)  
 Website: [www.fas.usda.gov](http://www.fas.usda.gov)

Mbalo Ndiaye  
 Agricultural Specialist  
 Foreign Agricultural Service  
 U.S. Embassy Dakar,  
 Ave. Jean XXIII B.P 49 Dakar, Senegal  
 Tel: (+221) 33-869 6100 ext. 3208  
 Fax: (+221) 33-820 5673  
 Email: [mbalo.ndiaye@fas.usda.gov](mailto:mbalo.ndiaye@fas.usda.gov)  
 Website: [www.fas.usda.gov](http://www.fas.usda.gov)

<sup>3</sup> Refer to recent GAIN reports on Rice, Wheat and Oilseeds

<sup>4</sup> 2,772,670 in 2007, i.e. 58% increase compared to 2006

<sup>5</sup> \$104 million import in 2007 (Source: Atlas Trade)

<sup>6</sup> \$ 12 million imports in 2006 (Post estimate)

<sup>7</sup> 13,111,535 CY 2008 to date,

**APPENDIX: STATISTICS****TABLE A: KEY TRADE & DEMOGRAPHIC INFORMATION**

	2005	2006	2007
Agricultural Imports From All Countries (\$Mil) / U.S. Market Share (%)	854.8 / 2%	839.9 / 2%	1,161/2%
Consumer Oriented Agricultural Imports From All Countries (\$Mil) / U.S. Market Share (%)	318.5 /1%	312.2 /1%	387.5/ 1%
Edible Fish and Seafood Imports From All Countries (\$Mil) / U.S. Market Share (%)	17.5/ 0	1.0 / 0.0	1.8/0.0
Total Population (Millions) / Annual Growth Rate (%)	11.0/2.4	11.7 / 2.4	12,8 (July 2008 est. <sup>8</sup> / 2.58
Urban Population (Millions) / Annual Growth Rate (%)	4.5/ 2.7	4.7/ 2.7	5.0/3
Number of Major Metropolitan Areas	2	2	2
Size of the Middle Class (Millions) / Growth Rate (%)	N/A	N/A	N/A
Per Capita Gross Domestic Product (U.S. Dollars)	794	817	1,700
Unemployment Rate (%)	N/A	N/A	48
Per Capita Food Expenditures (U.S. Dollars)	N/A	N/A	N/A
Percent of Female Population Employed	N/A	N/A	N/A
Exchange Rate (US\$1 CFA BECEAO Franc)			450

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<sup>8</sup> CIA Factbook

**TABLE B: CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS**

Senegal Imports (in thousands U.S. Dollars)	Imports from the World			Imports from the U.S.			U.S. Market Share %		
	2005	2006	2007	2005	2006	2007	2005	2006	2007
<b>CONSUMER-ORIENTED<sup>9</sup> AGRICULTURAL TOTAL</b>	318,517	312,261	387,473	2,290	1,557	1,911	1	1	1
Red meats, fresh, chilled or frozen	9,696	13,027	16,319	561	501	681	6	4	4
Red meats prepared or preserved	1,053	1,531	1,902	0	0	0	0	0	0
Dairy Products	74,608	83,487	104,186 <sup>ee</sup>	0	119	0	0	1	0
Eggs & products	2,179	3,042	6,724	0	0		0	0	
Breakfast cereals and Pancake mix	724	676	1,043	0.7	0	0	0	0	0
Fresh Fruits	14,863	15,332	21,201	0.2	0	0.5	0	0	0
Fresh Vegetables	26,104,	25,158	30,567	0	333	115	0	2	1
Processed Fruit & vegetables	10,681	10,276	12,888	30	14	11	1	1	1
Fruit & vegetable juices,	3,611	2,770	5,244	0	15	4	0	1	0
Feeds & Fodders	3,444,	1,748	2,773	175	175	10	5	10	1
Other consumer-oriented products	122,624	124,671	152,097	1,479	558	1,087	2	1	1
<b>FISH &amp; SEAFOOD PRODUCTS</b>	10,851	1,268	1,853	0.5	0	0	0	0	0
Fish & seafood, Canned	765,	621	1,429	0.1	0	0	0	0	0
Other Edible fish & seafood	10,086	647	423	0.4	0	0	0	0	0

Source: UN Commodity Trade Database; FAS/USDA reporting U.S Bureau of the Census Trade Data.

<sup>9</sup> There is a ban on poultry imports of frozen chicken since October 2005

Table C: Food and Agricultural Imports from the United States

Senegal Imports From United States United States Dollars			
Commodity	2005	2006	2007
Cereals	797,223	4,434,534	10,907,350
Fats and Oils	138,879	219,194	6,500,396
Vegetables	648,406	756,144	975,939
Meat	731,572	500,712	680,729
Miscellaneous Food	575,586	253,791	550,966
Beverages	888,624	322,234	453,145
Tobacco	10,921,172	5,232,648	405,968
Live Animals	2,421	34,840	85,786
Misc. Grain, Seed	144,263	79,983	84,213
Wood	22,903	28,881	29,122
Preserved Food	28,648	28,984	15,157
Food Waste	175,631	174,885	9,602
Edible Fruit and Nuts	23,156	9,311	3,813
Spices, Coffee, Tea	3,586	3,477	2,173
Other Vegetable Products	-	-	1,044
Baking Related	15,681	-	521
Sugars	25,907	295,041	180
Fish and Seafood	-	146	175
Hides and Skins	3,789	-	145
Milling; Malt; Starch	16,641	298,782	89
Cocoa	-	277	20
Prepared Meat, Fish	172	770	11
Dairy, Eggs, Honey	-	119,096	-
Live Trees and Plants	117	-	-
Animal Hair and Yarn, Wool	128	211	-
	<b>15,164,505</b>	<b>12,793,941</b>	<b>20,706,544</b>

Source: Global Trade Atlas